WINGX ADVANCE

August 2013

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BUSINESS AVIATION MONITOR

Source: Fotolia

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Where are we in the industry cycle?

Sequential month activity is down, as we would expect at this point in the year.
Excluding the seasonal effect, there seems to be a gradual recovery on trend.

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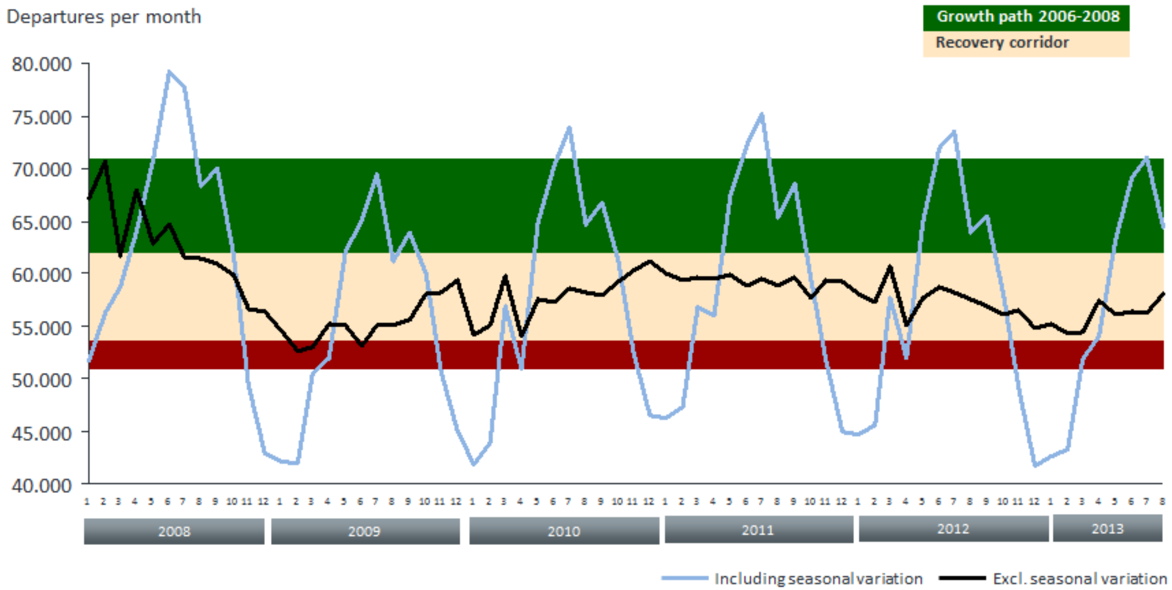
THE BIG PICTURE



Note: Only Charter and Private flights are considered

THE INSIDE STORY

For the European and peripheral Nth Africa and Middle East market:

- Analysis of key factors influencing this month
- Monthly YTD analysis departures & hours
- 5 year growth path for private and charter flights
- Pistons Vs Jets Vs Turboprops

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European Business Aviation departure growth in August

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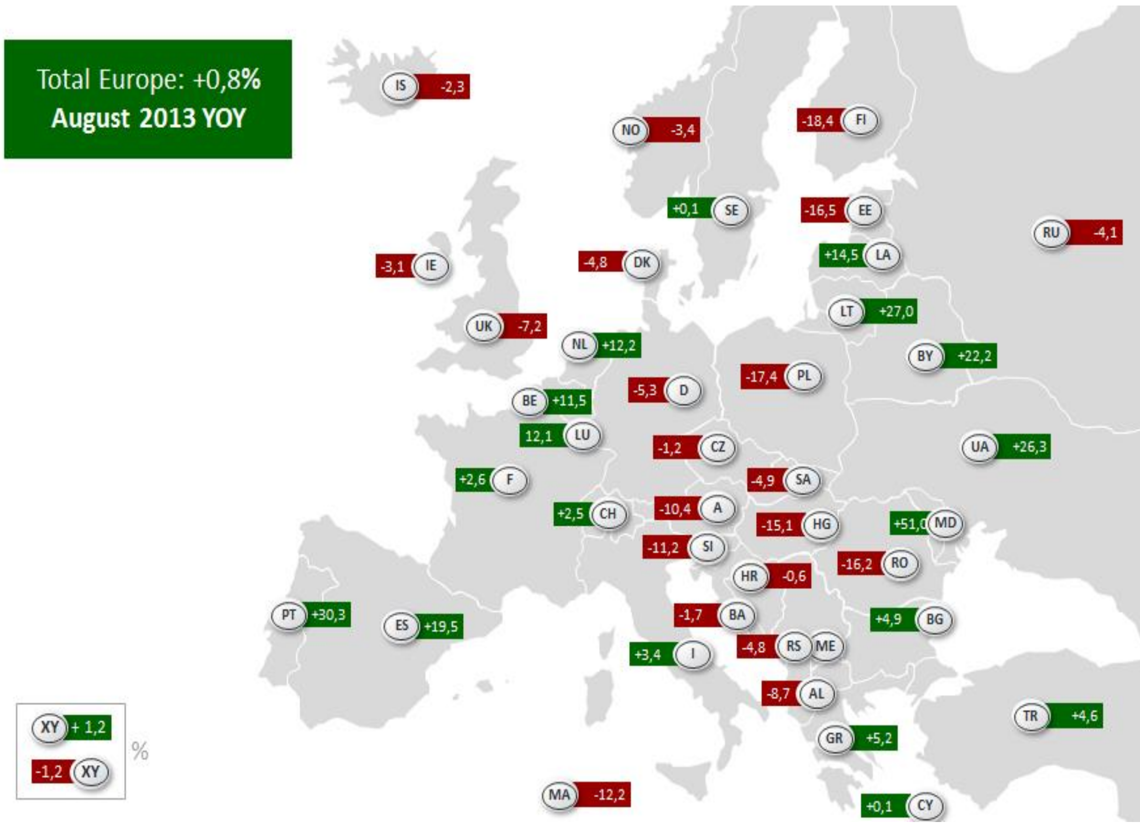
There was growth in 17 of 37 surveyed markets and an overall YOY increase of 0.8% in activity. Some large markets such as Spain, Italy, France, Switzerland grew activity.

THE BIG PICTURE



THE INSIDE STORY

For region by region analysis of business aviation activity:

- Flights gained and lost YOY and YTD
- Country market share and YOY growth of activity
- Pistons versus Jets versus Turboprops
- Distribution of Charter, Private and Other flights

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Principal regional flows, August 2013 and YOY change

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Domestic activity mostly grew (Turkey now has 4th largest domestic activity) . Russia/Spain-France, France-Switz, UK-Spain up, Switz/UK-Fr and UK, Germany, Greece domestic down.

THE BIG PICTURE

	France	UK	Germany	Italy	Spain	Switzerland	Turkey	Greece	Russia	Austria
France	6.8%	-9.5%	-7.7%	-5.2%	17.0%	2.3%	7.5%	3.1%	2.7%	-14.0%
Departures	4758	992	490	929	647	934	72	135	456	147
UK	-4.7%	-6.8%	-16.3%	-6.9%	7.6%	-12.8%	-21.3%	8.1%	-31.6%	-10.2%
Departures	1054	3289	318	339	424	285	37	80	54	53
Germany	-3.4%	-14.5%	-3.0%	-9.6%	17.6%	-6.7%	-27.1%	-18.9%	-20.6%	-14.4%
Departures	518	288	3438	329	267	403	105	86	104	368
Italy	-1.8%	2.8%	-5.5%	6.1%	21.4%	8.0%	-16.7%	3.9%	-5.9%	-5.2%
Departures	979	373	309	2072	363	405	70	211	368	147
Spain	13.8%	2.8%	24.3%	21.8%	24.9%	35.2%	107.7%	46.3%	2.7%	15.2%
Departures	612	434	261	363	1475	196	27	60	114	53
Switzerland	-5.9%	0.3%	-7.9%	23.2%	32.2%	12.8%	0.0%	-1.4%	8.7%	-6.6%
Departures	913	310	406	441	201	510	35	71	87	170
Turkey	5.9%	-6.7%	-24.2%	-23.8%	60.0%	20.0%	14.0%	18.2%	-1.3%	-58.8%
Departures	72	42	97	64	24	36	1249	143	301	7
Greece	-1.5%	0.0%	-2.3%	6.6%	19.1%	-25.9%	39.6%	-0.3%	0.0%	7.9%
Departures	128	86	85	227	56	63	134	684	120	41
Russia	3.8%	-13.8%	-13.6%	-4.2%	-4.8%	6.8%	0.3%	0.9%	350.0%	24.6%
Departures	406	69	121	321	100	78	317	111	9	71
Austria	-8.3%	3.4%	-21.6%	-14.0%	0.0%	2.9%	15.4%	-5.9%	11.9%	-16.4%
Departures	155	61	356	148	42	175	15	32	66	539

Note: Only Charter and Private flights are considered

THE INSIDE STORY

For traffic flows:

- Zoom in on country-country traffic flows
- Trends incoming flights from Middle East, Africa, BRICs
- All global ICAO region connections with European area
- Europe's most flown charter & private flight O&Ds, YOY

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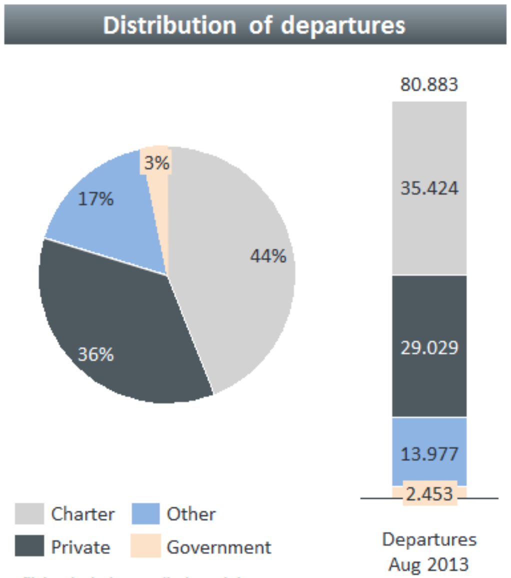
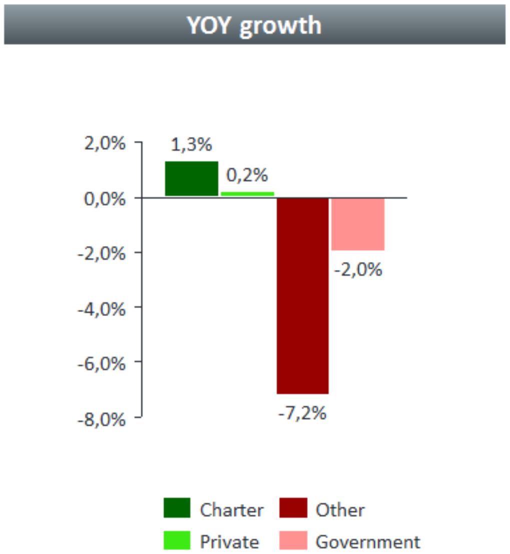
Activity by flight filing (mission type), August 2013

Growth in August mainly came from charter flights with marginal increase in private, and decrease in government and other (particularly training): as expected mid summer.

THE BIG PICTURE



Other flights include: Medical, Training



THE INSIDE STORY

For region by region:

- Each of last 12 months' private and charter activity
- Analysis of sector length growth by aircraft size segment and seat capacity segment
- Distinction between intra and outbound Euro region activity

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Top 15 Aircraft activity, by flight departures August

Apart from the usual suspects (up: Mustang, C300, GLEX; down: Bravo, Hawker 700), the XLS, Legacy and CJ2 posted YOY growth in August, and PC12 activity diminished.

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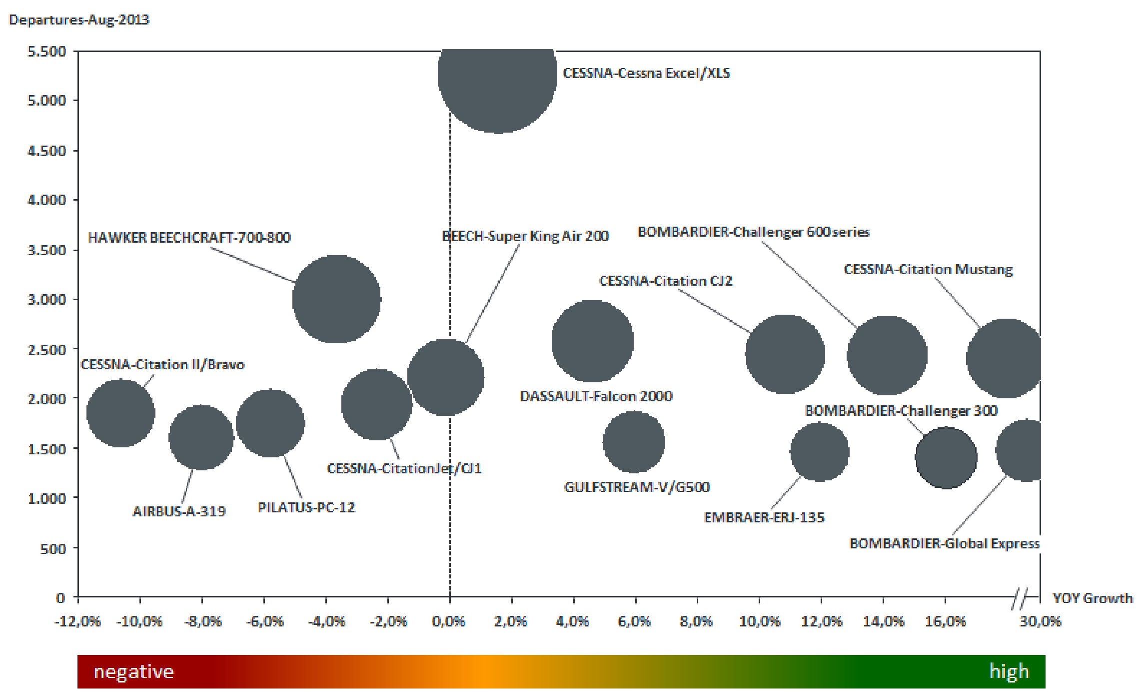

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THE INSIDE STORY

For Aircraft Types (Jets, Turboprops, Pistons):

- Focus on total departures, activity growth and market share in Charter flights
- Focus on total departures, activity growth and market share in Private flights
- Across whole fleet, zoom in on fastest and most significant winners and losers

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Top 20 Airport departures, YTD

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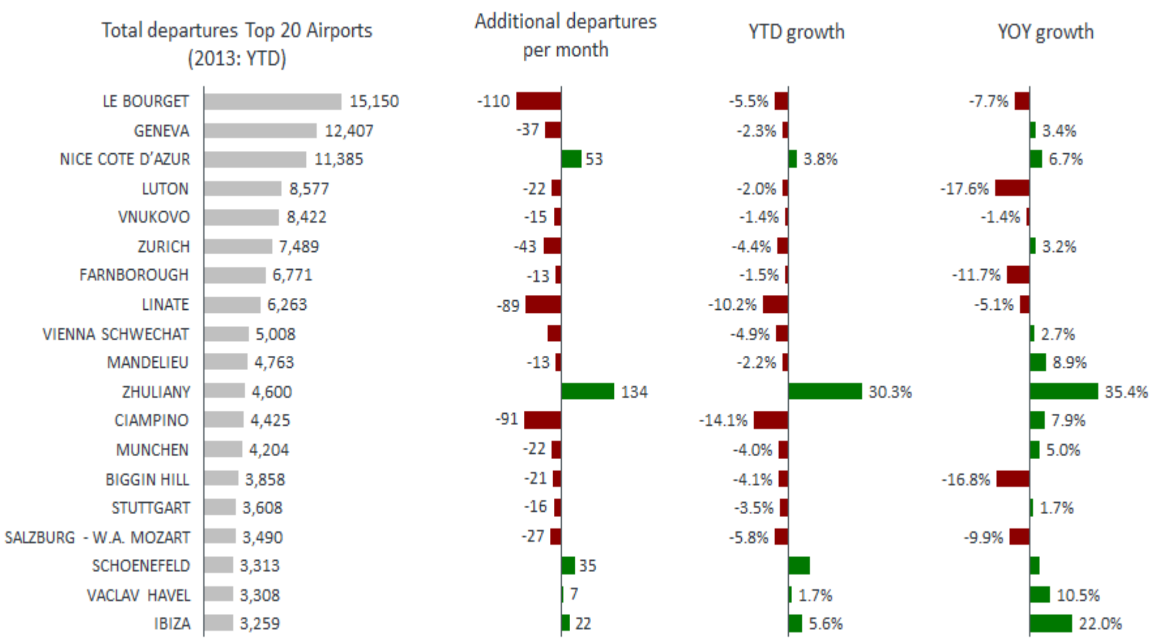
It was an active month for key Med airports Nice, Cannes, Ibiza. Ciampino and Linate maintained YTD worst declines, Zhuliany the largest increase. Unusual gain at Zurich.

THE BIG PICTURE



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THE INSIDE STORY

For Airports

- YOY activity growth by charter and private flights at 25 leading airports
- Focus on fastest growing and fastest falling airport activity throughout Europe: YOY growth and # departures

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Definitions

- The charts illustrated in this analysis source data from national business aviation associations, Eurocontrol, and the FAA, covering 50 European, Middle Eastern and North African national territories and the United States.
- All data analysis is carried out by WINGX Advance through our proprietary activity tracking methodology.
- Illustrated flight activity analysis pertains to all IFR registered flights within Eurocontrol and FAA territories and between Eurocontrol territories and the rest of the world.
- Flights within Eurocontrol territories are referred to as “EU domestic”, flights between these territories and the rest of the world are defined as “long haul”.
- The analysis covers all business aviation aircraft categories: Jets, Turboprops and Pistons, equating to 281 ICAO aircraft types. We also cover helicopters employed on off-shore operations.
- Coverage of business jet types used by commercial airlines is not comprehensive, but does capture, for example, Embraer Legacy (ERJ135) Bombardier 850 (CRJ200), A318 Elite, Airbus 319 and BBJ3 business aviation flights.
- Jet aircraft activity is segmented by cabin/range capability: Bizliner, Ultra Long Range, Super Mid Size, Mid Size, Super Light, Light, Entry Level, Very Light. All European off-shore operating helicopter types are also included.
- Utilisation of all aircraft is also categorised by Airframe OEMs. We also track business jet engine utilisation by OEM.
- The analysis, as indicated, covers all types of private and commercial (charter) departures. We also indicate the additional activity components corresponding to “other” flights (Government, Training, Military, Medical).
- Aircraft utilisation is measured by number of flight departures and the related number of flight hours. Our analysis does not include Overflights. We do include arrival flights from all global ICAO regions into Europe.
- The analysis is shown for the preceding calendar month; it is compared to the previous year same month (YOY or Year on Year), and to the current total activity for the year (YTD or Year to Date).

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